

Trauma Assessment Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A trauma assessment is a structured evaluation of a client's trauma history, current trauma- and stressor-related symptoms, dissociation, and immediate safety. Completed at intake, or when trauma surfaces during treatment; most run 300 to 900 words.

1 – Start with the referral, not the event why now, and what the client wants

Do: state the referral question and what the client wants from the assessment before any event detail.

Pitfall: opening with the trauma narrative; context, consent, and pacing come first.

2 – Screen the history, do not excavate it breadth first, depth only as needed

Do: use a structured event screen such as the LEC-5, name the index event and onset, and take only the detail the diagnosis and plan require.

Pitfall: pressing for a vivid account of every event; over-disclosure at a first meeting can retraumatize and is rarely needed.

3 – Symptoms by cluster, anchored to a measure both the number and the detail

Do: map symptoms to the four PTSD clusters (intrusion, avoidance, cognition and mood, arousal) and anchor them to a validated score such as the PCL-5.

Pitfall: a total score with no symptom detail, or detail with no measure; the record wants both.

4 – Screen dissociation and safety, even when negative on the line either way

Do: record depersonalization, derealization, and memory gaps, plus current safety, suicidal or self-harm risk, and any ongoing threat.

Pitfall: leaving either blank, so the record shows absence rather than assessment, or missing that the danger is present now.

5 – Exposure is not a diagnosis; sequence the plan stabilize before you process

Do: walk the criteria and duration before naming PTSD, then recommend stabilization before trauma processing, and date, sign, and revisit.

Pitfall: treating a trauma history as PTSD, or sending a client into exposure work before they are stable.

Before you sign

- ☐ Referral question and consent noted before event detail
- ☐ Index event and onset dated; history screened, not excavated
- ☐ Symptoms mapped to all four clusters and a measure recorded
- ☐ Dissociation and current safety documented, even if negative
- ☐ Diagnosis follows from criteria and duration, not exposure alone
- ☐ Plan sequences stabilization before processing, with a review date

Drafting with AI

Give it your interview notes: index event and onset, symptoms by cluster, any scores, dissociation and safety findings, strengths, and functional impact.

"Draft a trauma assessment from these notes: single-incident collision four months ago, nightmares and highway avoidance, PCL-5 42, no dissociation, denies SI, stable support, sleep and work affected."

Never paste client-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

300–900 words
typical length

20–40 min by hand
clinical team estimate

At intake or when trauma surfaces
when it's written

You · supervisors · payers
who reads it

Trauma Assessment Template

Copy or print for your practice - Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Client (initials):

Date:

Clinician:

Referral & presenting concern

Why the assessment is happening now, in the client's words; the referral question

Trauma history

Structured event screen (e.g. LEC-5); index event and approximate onset

Current symptoms

Map to the four PTSD clusters; add a measure and score (e.g. PCL-5)

Dissociation & current safety

Depersonalization, derealization, memory gaps; current safety, risk, and ongoing threat

Strengths, supports & functional impact

Protective factors, supports, and coping; effect on functioning and daily life

Clinical formulation & diagnostic impression

Whether criteria and duration are met; mechanisms linking history to presentation

Recommendations & plan

Modality, pacing, referrals, safety planning, follow-up and re-assessment

Screening tools used:

Re-assessment / review date:

Clinician signature / credentials:

Date signed: